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HealthRoster Personal Patterns



Blackpool Teaching Hospitals 
NHS Foundation Trust

People Centred

Positive

Compassion

Excellence

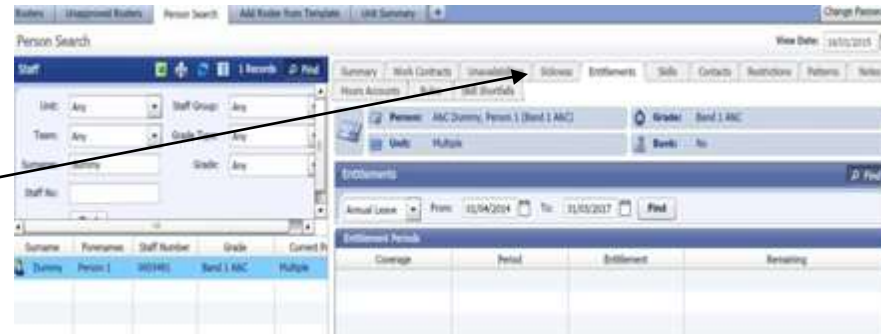
Adding a Personal Pattern

1. To Add a Personal Pattern go to Personnel (Blue tab on the left hand side) and Person Search

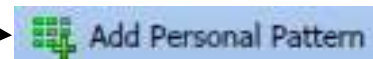


Enter the persons surname and click FIND

2. Select the Patterns tab on the right hand side. Add Personal pattern down the bottom of the screen

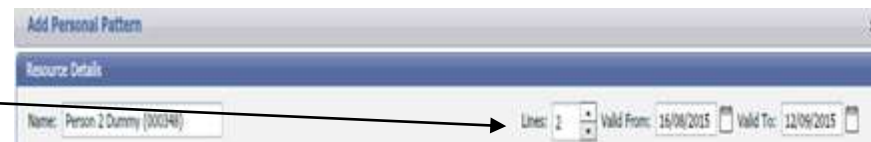


3. Select 'Add Personal Pattern' down the bottom of the screen



Please Note: If the staff member already has a pattern, click on their current pattern and select 'Edit Personal Pattern' down the bottom of the screen

4. If the staff member has more than 1 week personal pattern then select the number of 'lines' (weeks) the pattern is for



TIP: Personal patterns should only be added for members of staff who works a set pattern

Adding a Personal Pattern Continued....

5. The only box you need to complete is the 'Shift'. Select the Shift type in the drop down box
6. Select the day you wish to add the shift on
7. To adjust times from the standard. Click on the shift and Edit the Start and End time
8. Click 'Add'. Repeat steps 5 & 6 until you have completed the person's pattern.

The screenshot shows the 'Pattern Details' window for 'Monthly Recurring Activities'. The 'Item Details' section on the left contains the following fields:

- Duty Unavailability
- Shift Group: Functional
- Shift: N
- Roster Location: -
- Team: -
- Activity Category: -
- Activity Benchmarks: -
- Activity Type: -
- Activity Profile: -
- Work: 28:45
- Start: 19:30
- End: 07:30
- Add** (highlighted in red)
- Update

The calendar grid on the right shows the following shifts:

Line	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Time
Line 1		█	█		█			22:30
Line 2		█	█	█				02:15

Please Note: Changing someone's personal pattern will not change anything that has already been auto rostered. You will need to go back and make manual adjustments for these shifts. Personal patterns will take effect next time the auto roster is run

TIP: To add regular unavailability to a personal pattern, select the 'unavailability' button

Adding a Personal Pattern Continued....

Monthly recurring pattern

1. To set up a monthly recurring pattern select 'Monthly Recurring Activities'
2. The only box you need to complete is the 'Shift'. Select the Shift type in the drop down box you wish to add
3. To adjust times from the standard Click on the shift and Edit the Start and End time Click 'Update'
4. Select the Recurrence criteria and the 'From' date that the pattern commences
5. Click 'Add'

The screenshot shows the 'Edit Personal Pattern' dialog box. The 'Resource Details' section at the top shows 'Name: Person 2 Dummy (000348)', 'Lines: 2', 'Valid From: 16/08/2015', and 'Valid To: 12/09/2015'. The 'Pattern List' tab is set to 'Monthly Recurring Activities'. The 'Item Details' section on the left has the following fields: Shift Group (Functional), Shift (E), Roster Location (-), Team (-), Activity Category (-), Activity Benchmarks (-), Activity Type (-), and Activity Profile (-). Below these are 'Work: 07:30', 'Start: 07:00', and 'End: 15:00'. The 'Monthly Recurrence' section has 'Monthly Recurrence: First', 'Of every: 1', and 'Month(s)'. The 'From' date is '16/08/2015'. The 'Add' and 'Update' buttons are visible. On the right, a table shows the recurrence pattern: 'First Monday of every Month, starting from 16/08/2015' with a 'Next Occurrence' of '05/10/2015'. At the bottom, there are buttons for 'Add', 'Update', 'Remove', 'OK', and 'Cancel'.

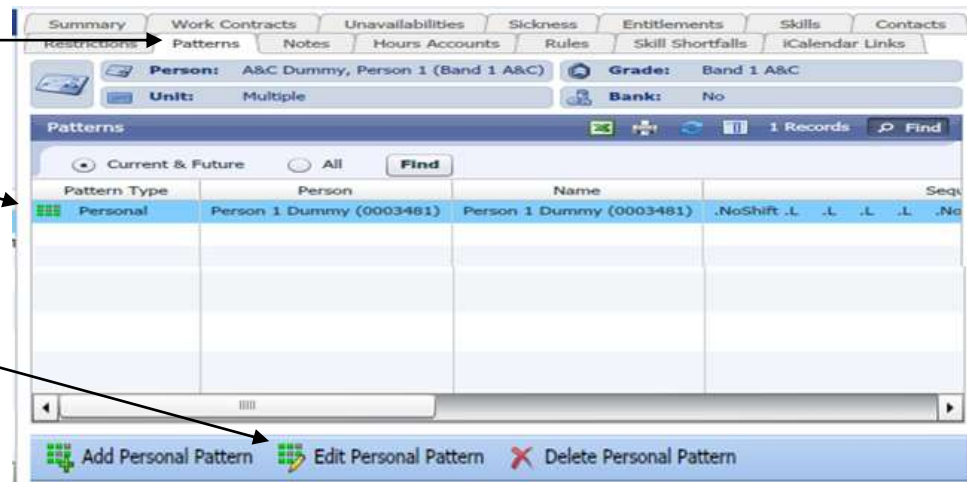
Please Note: Changing someone's personal pattern will not change anything that has already been auto rostered. You will need to go back and make manual adjustments for these shifts. Personal patterns will take effect next time the auto roster is run

Editing a Personal Pattern

1. To Edit a Personal Pattern go to Personnel (Blue tab on the left hand side) and Person Search
2. Enter the persons surname and click FIND



3. Select the 'Patterns' tab on the right hand side
4. Highlight the current Personal Pattern
5. Click on 'Edit Personal Pattern'
6. Update the personal pattern using steps 5-8 in the guide to adding a personal pattern



7. Select 'OK'